INTEGRATION OF MICROSOFT DYNAMICS 365 BUSINESS CENTRAL WITH CUSTOMER BI & REPORTING PORTAL TO STREAMLINE DATA MANAGEMENT IN AN IT COMPANY

CLIENT

An IT company specializing in the development of advanced software and cloud solutions for the business sector. The company serves clients across Europe, offering scalable IT systems and custom applications. The collaboration with getsix® began in 2022 with the implementation of Microsoft Dynamics 365 Business Central and integration with the Customer BI & Reporting Portal.

SECTOR: IT and new technologies

BUSINESS NEED

An IT company, rapidly growing in the new technologies market, was managing complex software development projects and an intense cash flow related to software licensing and cloud services. Despite having its own accounting department, the client sought a comprehensive ERP system that would not only automate financial processes, including KSeF handling, but also streamline sales management, inventory, and the production of dedicated IT equipment.

A key challenge was the need to integrate various departments and centralize data within one system to improve control over project costs and subscription revenues, as well as optimize the electronic document workflow. The company also faced the need to quickly adapt to changing market demands and ensure operational scalability as the business continued to grow.

COMPETENCIES UTILIZED IN THE PROJECT

+ Microsoft Dynamics 365 Business Central

+ Power BI

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Despite having an experienced accounting department, the company decided to implement an external accounting system to focus on the scalability of the solution and the ability to automatically generate advanced financial and operational reports.

DEVELOPED SOLUTIONS

To address these needs, Microsoft Dynamics 365 Business Central was implemented with financial, sales, inventory, and production modules. The implementation was carried out using a customized chart of accounts and integration with the client's existing IT systems, ensuring a smooth transition to the new ERP environment and streamlining the electronic document workflow.

A key component of the solution was the launch of the accounting module, which was integrated with the Customer BI & Reporting Portal. This tool enabled the IT company to generate advanced financial reports and real-time operational analytics. As a result, management gained full visibility into the profitability of individual projects and the ability to monitor revenue from software subscriptions and licensing.

Automation of financial processes, including KSeF handling, led to a significant reduction in manual data entry, which not only minimized the risk of errors but also sped up the closing of financial periods by 30%. The implementation of integrated sales and inventory modules enabled complete control over orders and stock levels, supporting the electronic document flow, which is particularly important in managing the production of custom IT equipment.

PROJECT IMPLEMENTATION STEPS

1. **Business needs analysis and implementation planning**: The project began with a detailed analysis of the financial and operational processes of the IT company to understand its specific requirements related to software licensing management, sales, and inventory. Based on the gathered information, an implementation plan was developed, considering scalability and integration with the client's existing IT systems.

2. **Implementation of Microsoft Dynamics 365 Business Central:** The financial, sales, inventory, and production modules were introduced, tailored to the IT industry's requirements. By applying a customized chart of accounts and integrating with the client's existing systems, the implementation process proceeded smoothly, without any operational downtime.

3. **Integration with Customer BI & Reporting Portal:** The ERP system was integrated with the Customer

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BI & Reporting Portal, enabling advanced financial reporting and real-time operational analytics. As a result, the IT company gained complete visibility into project profitability and financial flows related to software subscriptions and licensing.

4. **Automation of financial and operational processes**: Key financial processes such as invoicing and reporting were automated, significantly reducing manual data entry. Additionally, integrated sales and inventory modules were implemented, providing full control over orders and stock levels.

5. **System testing, user training, and system launch**: Upon completion of the implementation, comprehensive system tests were conducted, followed by user training for the client's employees. This enabled the team to quickly adapt to the new tools and begin effectively using Microsoft Dynamics 365 Business Central and the Customer BI & Reporting Portal.

ACHIEVED RESULTS

1. **30% reduction in the closing time of accounting periods**: Automation of financial processes, including KSeF compliance, significantly accelerated the closing of accounting periods, improving cash flow and enabling more precise budget management.

2. **50% reduction in manual data entry**: By integrating the ERP system with the Customer BI & Reporting Portal and automating financial processes, the IT company reduced the time spent on manual data entry by half, minimizing the risk of errors.

3. **40% improvement in control over subscription revenues and costs:** Advanced reporting and real-time operational analysis provided better control over project profitability and software licensing revenues, increasing financial efficiency by 40%.

4. **Full control over orders and inventory levels**: The integrated sales and inventory modules enabled effective management of stock and orders.

5. **35% increase in operational efficiency**: Automation of processes and data centralization in Microsoft Dynamics 365 Business Central, along with electronic document circulation, allowed for more efficient project and operations management, increasing the overall efficiency of the company by 35%.

IMPLEMENTATION OF THE MICROSOFT DYNAMICS 365 BUSINESS CENTRAL ACCOUNTING MODULE AND POWER BI

Manage your finances effectively with the advanced capabilities of **Microsoft Dynamics 365 Business Central** combined with the analytical tools of **Power BI**.
Create accurate financial reports, management reports, and leverage advanced Business Intelligence features to support **financial controlling** in your company.

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RESULTS ACHIEVED THROUGH THE INTEGRATION OF MICROSOFT DYNAMICS 365 BUSINESS CENTRAL WITH CUSTOMER BI & REPORTING PORTAL

*DIVISION BASED ON WORKING HOURS

- **30%** / **50%** / **40%** / **35%**
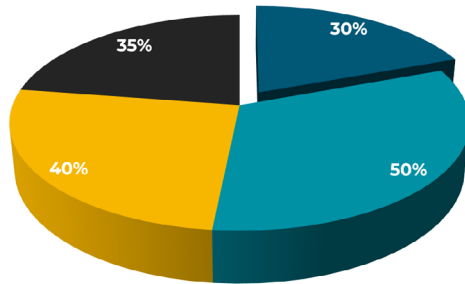
- ■ Reduction in the time to close financial periods
- ■ Reduction in manual data entry
- ■ Improvement in control over subscription costs and revenues
- ■ Increase in operational efficiency
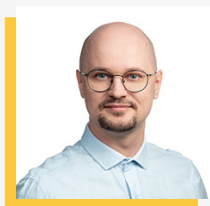
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Microsoft Dynamics Business Central 365 Partner

Detailed information available at: https://getsix.cc/3E2moWw

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BUSINESS INTELLIGENCE ANALYST

YURII

IT Solutions Department
Wrocław

MICROSOFT CERTIFICATION

Microsoft Certified:

Power BI Data Analyst Associate
Certification number:
3D44D8-CA64F6

Fabric Analytics Engineer Associate
Certification number:
13737C-C5CV3E

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